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DD/I RETIREMENT POLICY

Reference:

A. Policy

1. Referenced Notice states that "it is the practice in this Agency that an employee will normally retire when he becomes eligible unless he is asked to remain in service." Under this policy, eligibility for retirement with full basic annuity means that the employee has reached the age of 62 with at least five years of government service or age 60 with at least 30 years of government service.
2. Employees approaching retirement eligibility will be made aware of the Agency's retirement policy and of the various benefits and services available to retirees. They will be given the opportunity to consult with an appropriate senior official regarding personal problems, preferences, and any financial circumstances that may be pertinent to a discussion of their retirement plans.
3. There will be an annual review by each Office and the DD/I of all employees who are, or within two years will be, eligible for retirement. An appropriate senior official will interview each such employee.
4. Under normal circumstances, individuals will be expected to retire upon reaching the date of their eligibility for retirement or as soon thereafter as circumstances permit within a period of eighteen months. Where such retirement would impose undue financial or

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personal hardships, the individual will be urged to plan for retirement in advance of his 66th birthday on a date mutually acceptable to the individual and to the Agency.

5. In unusual circumstances and subject to annual review, individuals who have special competence or special skills may be asked to remain in the Agency's employ beyond the date of their eligibility for retirement until the age of 66. Beyond that, only in extremely exceptional instances where the individual concerned has a unique value to the Agency or has extraordinary financial problems, may it be suggested that he remain in service, subject to annual review, until the mandatory retirement age of 70.

6. In determining an acceptable date for retirement, consideration will be given not only to personal circumstances and preferences, but also to the usefulness of the individual to the Agency, length of service, physical conditions, blockage of the advancement of individuals junior to him, and any other facts that bear on the question.

7. After the first interview, the subsequent annual reviews and interviews of employees will be: (a) to determine whether those previously asked to remain should be asked to further extend their services another year or to settle at that time on a definite retirement date; or (b), with respect to the others, further to firm up the plans previously agreed upon or to review particular circumstances that might call for changes in those plans.

8. The Agency's Retirement Board will be informed of the agreement reached with each employee and will provide counsel upon request. The

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Board will be asked to consider those cases where the employee cannot come to an agreement with his Office and the DD/I in respect to his retirement.

B. Procedure

9. It is the responsibility of the heads of the major components within the DD/I area to insure that all employees within their respective components be interviewed regarding retirement by an appropriate senior official at least two years before they become eligible for retirement.\*

At this time the Agency policy on retirement and the DD/I interpretation thereof will be fully explained; Agency assistance in seeking opportunities for post-retirement employment will be explained; the variety of arrangements available with respect to annuities, survivor rights, life and health insurance, and any other benefits will be clearly stated; and the probable degree of need for the continued service of the employee after his date of eligibility for retirement will be indicated.

10. Not less than one year before an employee becomes eligible for retirement, an appropriate senior official will either ask the employee to continue his service for the year after eligibility for

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\* The minimum period stated above cannot be met for all those who are reaching eligibility until the policy has been in effect for two years.

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reasons indicated in paragraph 5 above, or will interview the employee for the purpose of establishing a mutually acceptable date for retirement. A record of understanding will be obtained in writing.

11. If, in the latter instance, no date for retirement mutually acceptable to the employee and the appropriate official can be arranged, the employee will be requested to seek the advice and counsel of the Executive Secretary of the Agency Retirement Board or, subsequently, of the Board itself if desired.

12. In those instances where agreed retirement dates cannot be established with the approval of the DD/I, it is the responsibility of the heads of the major components of the DD/I area to bring such cases, with the concurrence of the DD/I, to the attention of the Board without delay. The employee concerned will then be asked to appear before the Board.

13. For the purposes indicated in paragraph 7 under Policy, the senior officials are required to interview annually employees still in service who are eligible for retirement.

14. Any employee who wishes to inquire regarding retirement policy, benefits and services available to them should feel free to seek at any time the advice of their respective senior supervisory officials and the Executive Secretary of the Agency Retirement Board.

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